



From *IDEA* to *ACTION*

SELECTING ACTIVITIES

**A Program for Library Managers and Trustees
Presented During the
2005 Montana State Library Summer Institute
By Sandra Nelson
(www.sandranelson.com)**

June, 2005

FROM PLAN TO ACTION

SELECTING ACTIVITIES

AGENDA

We Have a Plan: Now What?

Planning is Not Doing: From Goals to Activities

- What Are We Doing Now?
- What Could We Be Doing?
- How Can We Choose?

Everything Takes Time or Money – or Both: Determining Resource Requirements

- What is Gap Analysis?
- Where Can We Find the Data We Need?
- How Do We Use Data to Make Decisions?

Define the Future: Selecting Final Activities

- What Criteria Should We Use?
- How Many Activities Can We Select?

Implementing for Results – Draft Outline

6/2005

Task 1: Identify Activities

- Step 1.1: Prioritize Goals
- Step 1.2: Identify Current Activities
- Step 1.3: Identify Possible New Activities

Task 2: Review and Organize Activities

- Step 2.1: Activities, Tasks, and Steps
- Step 2.2: Determine What Is Missing

Task 3: Select Preliminary Direct Service Activities

- Step 3.1: Evaluate for Effectiveness
- Step 3.2: Make Preliminary Selections

Task 4: Determine Resource Requirements for Activities

- Step 4.1: Identify Types of Resources Needed
- Step 4.2: Complete a Gap Analysis
- Step 4.3: Select the Appropriate Tools for Data Collection
- Step 4.4: Develop Data Collection Processes and Guidelines
- Step 4.5: Collect Data

Task 5: Select Final Activities

- Step 5.1: Determine Criteria for Selection
- Step 5.2: Apply Criteria to Preliminary Activities
- Step 5.3: Select Activities for Year One and Preliminary Activities for Years Two and Three

Task 6: Plan for Implementation

- Step 6.1: Assign Staff Responsibilities
- Step 6.2: Develop Activity Plans with Timelines
- Step 6.3: Coordinate Activity Plans

Task 7: Implement

- Step 7.1: Realign Staff Resources
- Step 7.2: Realign Facility Resources
- Step 7.3: Realign Collection Resources
- Step 7.4: Realign Technology Resources

Task 8: Monitor Implementation of Activities and Strategic Initiatives

- Step 8.1: Establish Monitoring Process and Schedule
- Step 8.2: Review Progress Monthly
- Step 8.3: Adjust as Needed

ALLOCATING RESOURCES

COMMUNITY NEEDS

[The Difference Between Vision and Current Conditions]



LIBRARY SERVICE RESPONSES

[Service Priorities]



GOALS

[The Outcome for the Community]



OBJECTIVES

[Measures of Progress Toward Reaching Goals]



ACTIVITIES

[What the Library Will Do To Accomplish the Objectives]



STAFF
NEEDED



COLLECTIONS
NEEDED

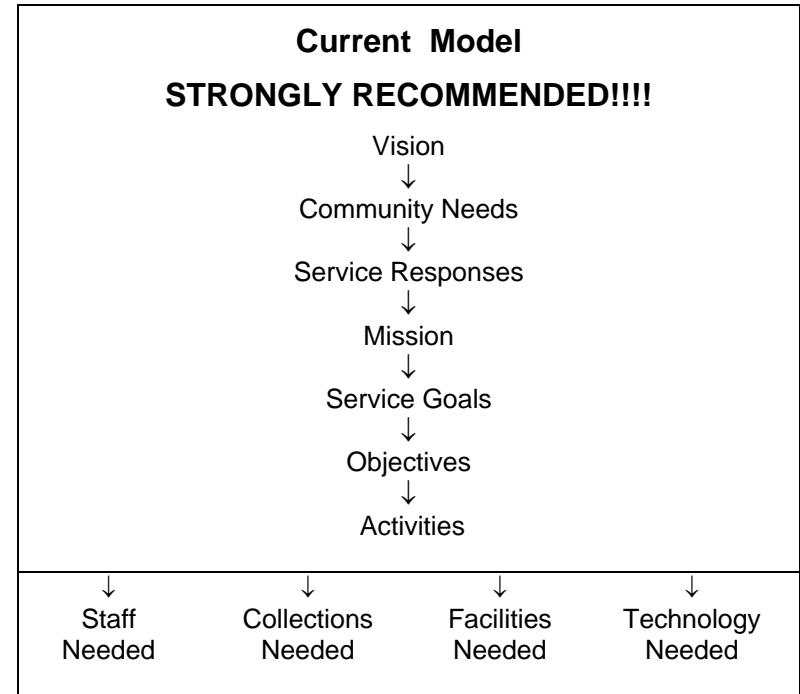
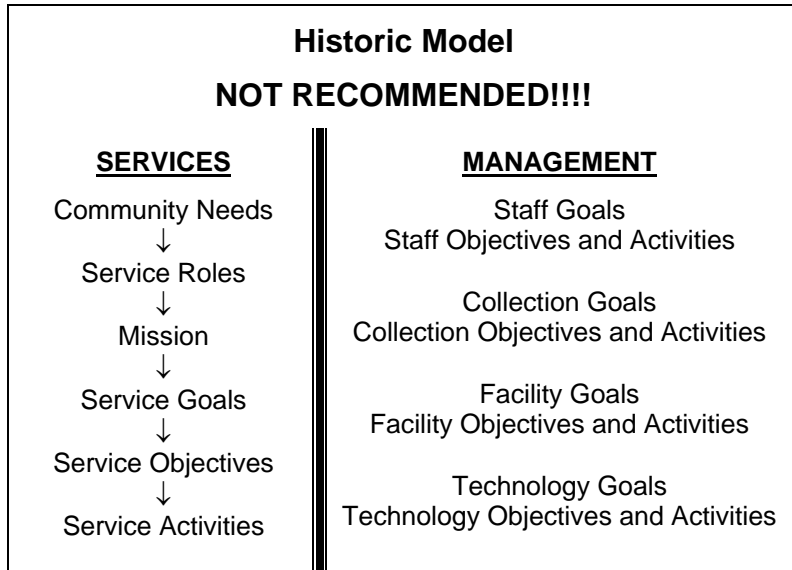


FACILITIES
NEEDED



TECHNOLOGY
NEEDED

TWO PLANNING MODELS



Historic Planning Assumptions

- Planning is about identifying new services and activities
- Our existing services are very good or excellent
- New services and activities require new resources
- If we don't get any new resources we can't accomplish our plan

Current Planning Assumptions

- Planning is about defining organizational priorities
- Our current services and activities must be regularly reviewed to ensure that they are effective and efficient in relation to current priorities
- Many new services and programs will have to be funded from reallocated resources
- We will accomplish the priorities in our plan with or without new resources

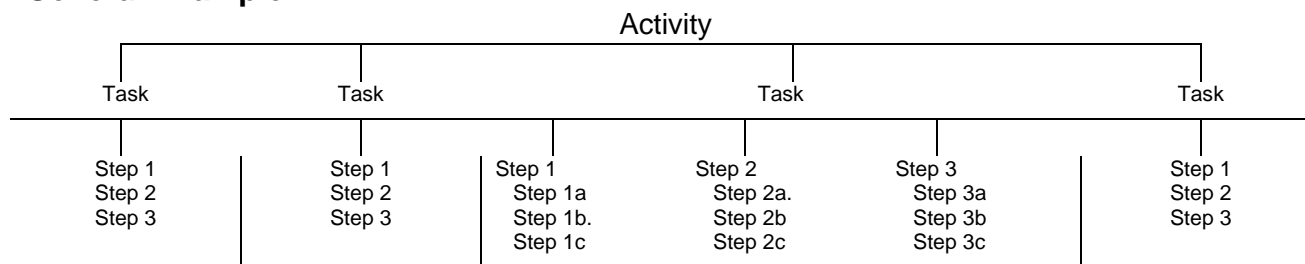
WHAT IS AN ACTIVITY?

ACTIVITY: A grouping of specific tasks that the library will carry out to achieve its goals and objectives. Activities result in an output of things done or services delivered.

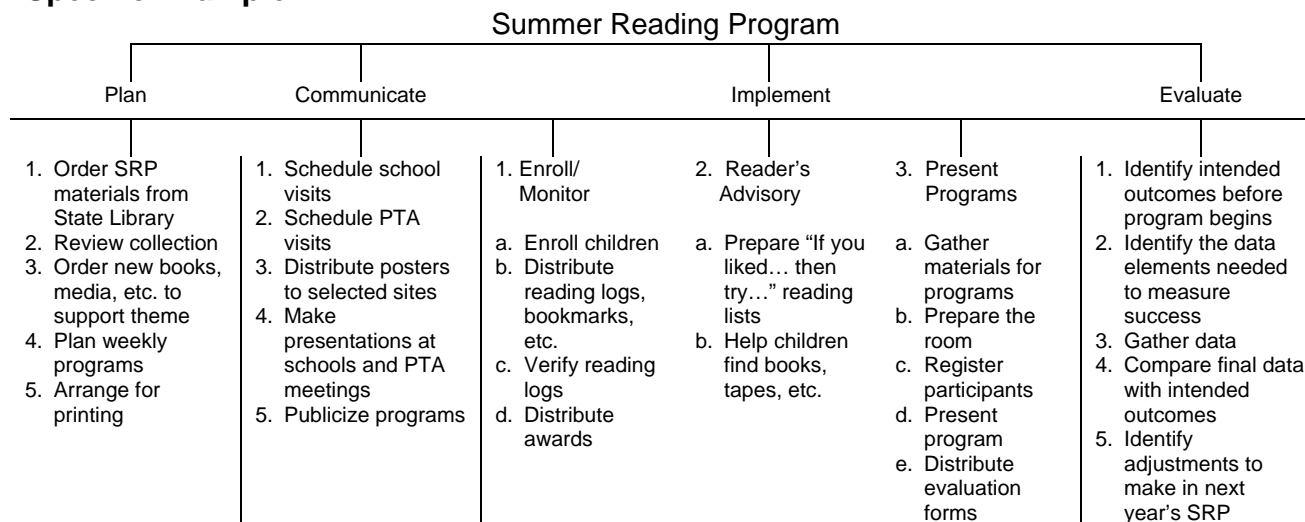
TASK: A process that converts inputs into an output.

STEP: Sequential actions taken in the performance of a task.¹

General Example



Specific Example



¹ Diane Mayo and Jeanne Goodrich. *Staffing for Results*. American Library Association, 2002

HOW TO REVIEW, CATEGORIZE, AND ORGANIZE ACTIVITIES

When a staff member develops a list of current or proposed activities, the list often includes a combination of activities and the tasks or steps that support those activities. Before you can decide which activities will be effective, you need to identify the items on the list that are really activities and delete those items that are supporting tasks or steps.

Below you will find a list of six activities and 18 tasks or steps. The *Tasks or Steps* list includes three items that relate to each of the six activities. Match each of the tasks and steps to the appropriate activity and place the letter of that activity in the *Match* box. The first answer is already filled in.

ACTIVITIES	MATCH	TASKS OR STEPS
A. Working with students who come in after school.	A	Answer homework-related questions from children and teens.
B. Planning and presenting four preschool story programs a week (Tuesday and Thursday, 10:00 am and 2:00 pm) in the library.		Award reading prizes.
		Determine display theme.
		Distribute reading logs.
		Help students find resources on the Internet.
C. Planning and presenting special puppet shows in the library during the major holidays throughout the year.		Make or purchase display materials.
		Make or purchase puppets.
		Mount the display.
D. Doing monthly bulletin board displays.		Practice finger plays for the program.
		Preview new books when they arrive.
E. Managing a summer reading program targeted toward children who can read.		Read reviews of new books and media.
		Recruit volunteers to help students with homework.
F. Selecting materials and maintaining the juvenile collections (the budget for preschool materials is not being increased, and the staff are making no significant changes in the kinds of materials purchased).		Rehearse the play.
		Repair or discard worn or damaged materials.
		Reserve the story room.
		Review reading logs.
		Select a play or a book that can be converted to a play.
		Select appropriate books to present.

ANALYZING ACTIVITIES CASE STUDY

The *Anytown Branch Library* serves a neighborhood that includes a large number of families with young children. The neighborhood is made up primarily of lower- and middle-class families and in most families both parents work.

GOAL:

The library completed a planning process last year and decided that one goal should be "Preschool children will develop a love of books and reading."

OBJECTIVES:

1. During 2006/07, at least ____ individual children under the age of six will participate in one or more library-sponsored programs.
2. By the end of 2006/07, the circulation of easy books and picture books will increase by ____%.
3. By the end of 2006/07, ____ % of preschool caregivers will indicate that the library played an important role in introducing children to the love of books and reading.

ACTIVITIES:

The library has two staff members who work in the children's area. Almost all of their work is done in the library although they do visit some classrooms each spring to promote the summer reading program. Their current activities that provide direct services to the public include:

1. Working with students who come in after school.
2. Planning and presenting four preschool story programs a week (Tuesday and Thursday, 10:00 am and 2:00 pm) in the library.
3. Planning and presenting special puppet shows in the library during the major holidays throughout the year.
4. Doing monthly bulletin board displays.
5. Managing a summer reading program targeted toward children who can read.
6. Selecting materials and maintaining the juvenile collections (the budget for preschool materials is not being increased, and the staff are making no significant changes in the kinds of materials purchased).

EVALUATING EFFECTIVENESS

THE *EFFECTIVENESS* OF AN ACTIVITY IS A MEASURE OF THE POTENTIAL OF THAT ACTIVITY TO PRODUCE AN IDENTIFIED RESULT OR OUTCOME.

Effectiveness can be measured by three elements, each of which has a five level scale:

Effectiveness Scale

Target Audience Served

- 1 = The entire audience
- 2 = Most of the audience
- 3 = Some of the audience
- 4 = Few of the audience
- 5 = None of the audience

Affect on Outcome

- 1 = Very high
- 2 = High
- 3 = Moderate
- 4 = Low
- 5 = None

User Reaction

- 1 = Users will love it
- 2 = Users will like it a lot
- 3 = Users will think it is OK
- 4 = Users will not care much
- 5 = Users will not care at all

Target Audience Served

Design: To be effective, an activity must be designed to serve the audience identified in the intended outcome or result. Activities designed to serve children are rarely effective ways to provide services to teens. Activities designed to serve young parents are not normally effective ways to serve seniors.

Delivery Time and Place: Programs designed to serve specific target audiences may be less effective because they are not delivered at times or in places appropriate for those audiences. Programs for students that are delivered in the library during school hours will probably serve fewer students than programs for students delivered in the library after school. Programs for working adults presented during the workday will probably serve fewer adults than programs presented in the evening or during the weekend.

Affect on Outcome

Services: The services provided by the activity must relate to identified result or outcome. An activity that provides literacy services to adult learners will not be an effective way to increase the circulation of fiction. On the other hand, buying multiple copies of current fiction titles will be not an effective way to help illiterate adults learn to read.

User Reaction

Emotional Response: This is the most intangible of the three elements. Effective activities appeal to the intended users. The more appealing the activities are, the more likely they are to be effective. A program featuring a well-known author will be more appealing than a program featuring an unknown author. Some users find media much more appealing than print items. The availability of free Internet access is appealing to many users.

ANALYZING ACTIVITIES CASE STUDY

PART I: EFFECTIVENESS OF CURRENT ACTIVITIES

DIRECTIONS:

Use the *Effectiveness Scale* on page 7 to determine the effectiveness of each of the current activities. Record your answers below.

The *Anytown Branch Library* serves a neighborhood that includes a large number of families with young children. The neighborhood is made up primarily of lower- and middle-class families and in most families both parents work.

GOAL:

The library completed a planning process last year and decided that one goal should be "Preschool children will develop a love of books and reading."

OBJECTIVES:

4. During 2006/07, at least ____ individual children under the age of six will participate in one or more library-sponsored programs.
5. By the end of 2006/07, the circulation of easy books and picture books will increase by ____%.
6. By the end of 2006/07, ____ % of preschool caregivers will indicate that the library played an important role in introducing children to the love of books and reading.

Current Activity	Target Audience Served	Affect on Outcome	User Reaction
1. Working with students who come in after school.			
2. Planning and presenting four preschool story programs a week (Tuesday and Thursday, 10:00 am and 2:00 pm) in the library.			
3. Planning and presenting special puppet shows in the library during the major holidays throughout the year.			
4. Doing monthly bulletin board displays.			
5. Managing a summer reading program targeted toward children who can read.			
6. Selecting materials and maintaining the juvenile collections (the budget for preschool materials is not being increased, and the staff are making no significant changes in the kinds of materials purchased).			

ANALYZING ACTIVITIES CASE STUDY

PART II: MODIFIED OR NEW ACTIVITIES

DIRECTIONS:

1. Follow the *Rules for Brainstorming* to identify new or changed activities that would support the goal and objectives in the case study on page 6. List them in the blank lines below. Use back of the page if you need more space.
2. Use the information on *Evaluating Effectiveness* (page 7) to re-evaluate the effectiveness of the current activities. The discussion of new or modified activities may have changed your perceptions.
3. Use the information on *Evaluating Effectiveness* (page 7) to evaluate the effectiveness of the new or modified activities.
4. Finally, place an asterisk by the six most effective activities on the list.

Activity	Target Audience Served	Affect on Outcome	User Reaction
1. Working with students who come in after school.			
2. Planning and presenting four preschool story programs a week (Tuesday and Thursday, 10:00 am and 2:00 pm) in the library.			
3. Planning and presenting special puppet shows in the library during the major holidays throughout the year.			
4. Doing monthly bulletin board displays.			
5. Managing a summer reading program targeted toward children who can read.			
6. Selecting materials and maintaining the juvenile collections (the budget for preschool materials was not increased last year, and the staff made no significant changes in the kinds of materials purchased).			
7.			
8.			
9.			
10.			
11.			
12.			

RULES FOR BRAINSTORMING

1. Be creative. Push the limits.
2. Never criticize anyone's ideas. There are no right answers or wrong answers.
3. The more ideas you contribute the better. Quantity is more important than quality.
4. Free-associate ideas.
5. Build on the ideas of others.
6. Don't discuss ideas or stop for explanations.
7. Record all ideas exactly as they are stated.
8. Take turns making suggestions. Contribute one idea each time it is your turn.

RESOURCE ALLOCATION ISSUES

FACTS AND ASSUMPTIONS

FACTS

- Fact 1: Library customers are more diverse than ever and their needs and expectations have changed over the past decade.
- Fact 2: Libraries that do not modify their service priorities to meet the changing needs and expectations of their customers will lose local support.
- Fact 3: New priorities require new activities or increased emphasis on selected current activities.
- Fact 4: New activities or increased emphasis on selected current activities will require additional resources.
- Fact 5: Every library has a finite amount of resources: full-time equivalent (FTE) staff, collection budget, square feet of space, and technological infrastructure.
- Fact 6: Every library is utilizing most or all of the available resources on current activities.
- Fact 7: Most city, county, state governments are dealing with significant revenue shortfalls. As a result most library funding is flat or declining.
- Fact 8: Even in good economic times, there are not going to be enough resources available to allow library staff to do keep doing everything they do now and to provide new or expanded services and programs.

ASSUMPTIONS

- Assumption 1: Library managers and boards must reallocate existing resources to provide new or enhanced services to support changing priorities.
- Assumption 2: Nothing gets done unless someone is assigned to do it. Reallocation starts with staffing.
- Virtually every staff member cares about his or her job and believes that is important.
 - Almost all staff believe that their job performances are above average.
 - The changes in library services and customer expectations in the past decade have been stressful for many library staff members.
 - Many staff already feel overworked and underappreciated and are concerned about being asked to do additional activities to support new priorities.
- Assumption 3: Many staff have strong feelings about the value of various segments of the library's collections, which can make reallocation of collection dollars challenging.
- Assumption 4: Most of us assume that the buildings in which we work cannot be changed in any substantive way and develop work-arounds to make our spaces more useable.
- Assumption 5: Staff who work with outdated computer hardware and software often find it difficult to help library users who have access to newer hardware and software in their homes or businesses.

GAP ANALYSIS

(Adapted from *Managing for Results: Effective Resource Allocation for Public Libraries*)

SERVICE RESPONSE/ACTIVITY			
[Resource Under Review]	Have	Need	Gap
	Plan for Filling the Gap or Reallocating the Surplus		
[Resource Under Review]	Have	Need	Gap
	Plan for Filling the Gap or Reallocating the Surplus		

RESOURCE ALLOCATION DEFINITIONS

CAPACITY

a. Ability to perform or produce; capability: *Only one staff member is capable of speaking fluent Spanish.* **b.** The maximum or optimum amount that can be produced: *The four public access computers available during the forty hours per week the library is open provide a total capacity of 160 hours per week.*

UTILIZATION

a. The act of using; the application or employment of something for a purpose: *The librarian used an electronic database to answer the question.* **b.** The condition or fact of being used: *The materials in the children's area get heavy use.*

ACCESS

A means of approaching, entering, exiting, or making use of; passage: *Library users now have dial-in access to library's holdings and the Internet.*

AGE

The length of time something has existed: *The building is 35 years old.*

CONDITION

Existing circumstances: *The book was torn and discolored and generally in poor condition.*

DECIDING WHAT DATA TO COLLECT

	STAFF	COLLECTION	FACILITIES	TECHNOLOGY
CAPACITY	<ul style="list-style-type: none"> ▪ Abilities and skills ▪ Hours Available by classification, by location, etc. 	<ul style="list-style-type: none"> ▪ Number of volumes ▪ Number of titles 	<ul style="list-style-type: none"> ▪ Materials Storage ▪ Equipment and Furniture ▪ Public and staff space (sq. ft.) 	<ul style="list-style-type: none"> ▪ Workstations and Terminals ▪ Equipment, Software, and Telecommunications ▪ Printers
UTILIZATION	<ul style="list-style-type: none"> ▪ Abilities and skills ▪ Public service indicators ▪ Analysis of an activity 	<ul style="list-style-type: none"> ▪ Circulation ▪ In-Library Use ▪ Off-site Use 	<ul style="list-style-type: none"> ▪ Materials Storage ▪ Equipment and Furniture ▪ Public and staff space (sq. ft.) 	<ul style="list-style-type: none"> ▪ Workstations and Terminals ▪ Printers
ACCESS		<ul style="list-style-type: none"> ▪ Document Delivery ▪ Materials Availability ▪ Electronic Text Availability 	<ul style="list-style-type: none"> ▪ Public and staff space 	<ul style="list-style-type: none"> ▪ Printers ▪ Adaptive Technologies ▪ Bandwidth
AGE/CONDITION		<ul style="list-style-type: none"> ▪ Copyright Date ▪ Coverage ▪ Timeliness ▪ Worn/Damaged 	<ul style="list-style-type: none"> ▪ Equipment and Furniture ▪ Space ▪ HV/AC 	<ul style="list-style-type: none"> ▪ Workstations and Terminals ▪ Equipment, Software, and Telecommunications ▪ Printers

From *Managing for Results: Effective Resource Allocation for Public Libraries*.

USING DATA TO MAKE ACTIVITY DECISIONS

- 1. Identify the most effective activities for a goal.**
- 2. Identify the personal issues that may influence the decision-making process.**
 - a. Is this a new goal for the library or is it an existing goal?
 - b. Are most of the activities under review new activities or are most of them variations on existing activities?
 - c. Are there strong staff constituencies for one or more of the activities under review?
 - d. Are there strong public constituencies for one or more of the activities under review?
 - e. Is there likely to be strong staff resistance to any of the activities under review?
 - f. Is there likely to be strong public resistance to any of the activities under review?
- 3. Identify the data you will need to make a decision (see next page).**
 - a. Identify the types of resources (staff, materials, facilities, or technology) that will be required to implement each of the activities under review. Put the required resources in priority order (e.g: staff is most important, then materials, then space, and finally technology).
 - b. Review the information on page 14 to get an idea of the data elements that you might collect about each of the required resources for each of the activities under review.
 - c. Decide which of the possible data elements on page 14 would help you and your colleagues make an informed decision.
- 4. Identify the source or sources for each data element identified in #3.**
 - a. What data does the library currently collect for each data element?
 - b. Are there workforms or templates available for collecting data that is not currently being collected?
 - c. Will data be worth the effort it will take to collect them?
- 5. Gather the data.**
 - a. Define each data element to be collected.
 - b. Select or create a data collection instrument.
 - c. Write the procedure for collecting the data.
 - d. Assign one staff member to be responsible for collecting the data for each data element.
 - e. Train staff to collect the data.
- 6. Review the data.**
 - a. Sort the data.
 - b. Tabulate the data.
 - c. Analyze the data.
- 7. Identify the options.**
 - a. Which activities are the most cost-effective?
 - b. Which activities provide the most balanced use of all types of resources?
 - c. Which activities could be modified to reduce the resources required?
 - d. Which activities would require more resources than can be reallocated?

TYPES OF RESOURCES NEEDED

Decide what types of library resources will be required to complete each of the activities below. Library resources can be divided into four main categories:

- Staff (Full-time and Part-Time)
- Collections (Print, Media, and Electronic)
- Facility (Space, Equipment, Wiring, HVAC, Lighting)
- Technology (Terminals and Servers, Software, Telecommunications)

ACTIVITY A: *To plan and present a series of monthly programs for newcomers to your community.*

1. What resource will most significantly be affected: _____
2. What other resources will be affected: _____

ACTIVITY B: *To provide off-site access to electronic resources selected to meet the needs of the business community.*

1. What resource will be most significantly affected: _____
2. What other resources will be affected: _____

ACTIVITY C: *To establish a homework help center for junior high students.*

1. What resource will be most significantly affected: _____
2. What other resources will be affected: _____

ACTIVITY D: *To house the adult and young adult fiction, video, and audio materials together in an easily accessible site.*

1. What resource will be most significantly affected: _____
2. What other resources will be affected: _____

ACTIVITY E: *To develop a collection of Spanish language materials to serve Hispanic residents in your community.*

1. What resource will be most significantly affected: _____
2. What other resources will be affected: _____

USING DATA TO MAKE ACTIVITY DECISIONS

CASE STUDY

Goal: Teens will have a wide variety of programs, services and materials that focus on their current interests and satisfy their recreational needs.

Objective 1: The number of teen materials checked out from the library will increase five percent annually through 2008.

Objective 2: The Teen Community web page will average 1500 page views per month by 2008.

Objective 3: At least ten percent of district teens (6th through 12th grade) will participate in the summer reading club, attend teen programs, or use library services in 2005-06, and that percent will increase to fifteen percent by 2008.

1. Identify the most effective activities for a goal.

2. Identify the personal issues that may influence the decision-making process.

3. Identify the data you will need to make a decision.

4. Identify the source or sources for each data element identified in #3.

5. Gather the data.

6. Review the data.

7. Identify the options.

CRITERIA FOR SELECTING FINAL ACTIVITIES

At the end of the activity process you will have a list of effective activities for each goal in your plan and you will understand the resource allocation implications of each activity. The last task in this process will be to select the final activities. List some of the criteria that you might use to select the final activities for the first year of your planning cycle and the preliminary activities for second and third years of your planning cycle.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

The New Planning for Results

IDENTIFYING ACTIVITIES WORKFORM

Library or Library Unit: _____

Goal (complete a copy of this workform for each of your goals): _____

Part I: Current Unit Activities

- A. **Identify current activities.** Review the objectives that will be used to measure progress toward the above goal. Work with staff to identify the activities that are currently being done in the library or library unit to support that goal.
- B. **Review, categorize, and organize current activities.** List the activities in the "Current Activity" column below. Add additional pages if needed.
- C. **Evaluate effectiveness of current activities.** Distribute and review "Evaluating Effectiveness" to help staff understand the elements of effective activities. Discuss and rank each activity in the three categories listed on the table below using the effectiveness scale on the "Evaluating Effectiveness" handout.

Current Activity	Target Audience Served	Affect on Outcome	User Reaction
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

IDENTIFYING ACTIVITIES WORKFORM– Page 2

Part II: New or Modified Activities

- A. **Identify new or modified activities.** Review the goal and objectives again. Distribute and review the “Rules for Brainstorming” and follow the rules during the discussion.
- B. **Review, categorize, and organize new or modified activities.** List the activities in the “New or Modified Activity” column in the table below. Add additional pages if needed.
- C. **Evaluate effectiveness of new or modified activities.** Distribute and review “Evaluating Effectiveness” to help staff understand the elements of effective activities. Discuss and rank each activity using the effectiveness scale on the “Evaluating Effectiveness” handout.

New or Modified Activity	Target Audience Served	Affect on Outcome	User Reaction
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			
21.			
22.			
23.			
24.			
25.			

IDENTIFYING ACTIVITIES WORKFORM – Page 3

Part III: Selected Activities

- A. **Select final activities.** Based on the rankings of your current activities and the new or modified activities that you might offer to support the goal, select the activities that you plan to implement during the next fiscal year. List those activities in the “Selected Activities” column in the table below.
- B. **Classify final activities.** Indicate if each selected activity is a “Current” activity, a “Modified” activity, or a “New” activity by placing an X in the appropriate box.
- **Current:** This is an activity that you plan to provide exactly as it is being provided now. The activity will require no new resources and you do not plan to reduce the resources currently allocated to support it.
 - **Modified:** This is an activity that you are currently providing and plan to continue to offer in a modified form. You may be planning to expand the activity by adding more resources to support it, or you may be planning to limit the activity by reducing the resources allocated to support it.
 - **New:** This is an activity that is not being offered in any form in your branch/unit at this time.

Selected Activities	Current	Modified	New
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			

The New Planning for Results

IDENTIFYING ACTIVITIES WORKFORM

SUGGESTIONS AND GUIDELINES

PART I: CURRENT UNIT ACTIVITIES

A. Identify Current Library or Library Unit Activities

1. Review the goal and its supporting objectives.
2. Ask each staff member to develop a list of current activities that support the goal.

B. Review, Categorize, and Organize Current Activities

1. After each staff member has had a chance to develop his/her own list of current activities, bring the staff together and briefly discuss the process you will be using to record their work.
2. Ask a staff member to read his/her first activity and record the activity on a flip chart. As you record each activity:
 - a. Ask staff if anyone else identified a similar activity. If so, merge the activities into a single activity before recording.
 - b. Ask staff to consider if any of the activities they identified might actually be tasks or steps of the activity you are recording. If so, ask them to remove the task or step from their lists.
3. Continue recording activities as described in 2a-b. Ask each staff member in turn to read one of his/her activities until all activities have been recorded.
4. When all of the current activities have been recorded, tape the sheets with the activities on the wall. Ask staff to read through the activities one more time.
 - a. Identify and merge similar activities.
 - b. Delete items that are tasks and steps of identified activities.
 - c. If there are one or more items that appear to be tasks or steps but don't seem to apply to any identified activity, identify the activity they support and add it to the list. Then delete the tasks or steps.
5. Prepare a list of current activities and record them in the "Current Activity" column in Part I of the *Identifying Activities Workform*.

C. Evaluate Effectiveness of Current Activities

1. Distribute *Evaluating Effectiveness* and discuss it with staff.
2. When you are sure that everyone understands the rating scale, use the scale to evaluate the effectiveness of the current activities on your list.

PART II: NEW OR MODIFIED BRANCH/UNIT ACTIVITIES

A. Identify New or Modified Activities

1. Brainstorming is an excellent way to develop a creative list of new ideas. Distribute the *Rules for Brainstorming* and review them with staff.
2. Review the goal and objectives with staff again.
3. Explain that the purpose of the brainstorming exercise is to identify new activities or modifications in current activities that would support the goal.
4. Give staff a few minutes to think about new or modified activities.
5. Start the brainstorming by asking one staff member to give one idea for a new or modified activity. Record the idea on a flip chart and move on to the next staff member. Continue until all staff members have had a chance to state all of their ideas.

B. Review, Categorize, and Organize New or Modified Activities

1. When all of the suggested new or modified activities have been recorded, tape the sheets with the activities on the wall. Ask staff to read through the activities.
2. Identify and merge similar activities.
3. Delete items that are tasks and steps of identified activities.
4. If there are one or more items that appear to be tasks or steps but don't seem to apply to any identified activity, identify the activity they support and add it to the list. Then delete the tasks or steps.
5. If more ideas for new or modified activities emerge during the discussion, record them.
6. Prepare a list of new or modified activities and record them in the "New or Modified Activity" column in Part II of the *Identifying Activities Workform*.

C. Evaluate Effectiveness of New or Modified Activities

1. Review *Evaluating Effectiveness* with staff again.
2. When you are sure that everyone understands the rating scale, use the scale to evaluate the effectiveness of the new or modified activities on your list.

PART III: SELECTED ACTIVITIES

A. Select Final Activities

1. Review the effectiveness rankings of both current and new or modified activities with staff.
2. Allow staff to discuss the effectiveness rankings that were assigned during Parts I and II. Effectiveness rankings can be revised during this part of the process if necessary.

3. Based on the final effectiveness rankings, select the activities for this goal for the next fiscal year.
 - a) There is no specific number of activities that you should select for each goal.
 - b) The activities you select, taken together, should result in your branch/unit meeting the standards of program success that you set in the objectives for this goal on *Workform E: Branch/Unit Goals and Objectives*.
 - c) You will be identifying activities for all of the goals that you selected on Workform E.
 - d) You will have to reallocate your resources to support all new or expanded activities.

B. Identify Activities as Current, Modified, or New

1. **Current:** *This is an activity that you plan to provide exactly as it is being provided now. The activity will require no new resources and you do not plan to reduce the resources currently allocated to support it.*
2. **Modified:** *This is an activity that you are currently providing and plan to continue to offer in a modified form. You may be planning to expand the activity by adding more resources to support it, or you may be planning to limit the activity by reducing the resources allocated to support it.*
3. **New:** *This is an activity that is not being offered in any form in your branch/unit at this time.*